1. Workgroup Definition			
Workgroup Name:	Business Case Workgroup		
Chair Person:	Bob Giannuzzi – EPMO	**Meetings:**	About every two weeks
Start date:	January 3, 2011	**End date:**	June 30, 2011

Workgroup Purpose? (Describe the business issues being addressed and what are the business goals/objectives to be attained)

1. EPMO project workflow process requires a business case that demonstrates that the subsequent benefits at least recover the cost of doing the project.
2. Especially in the current state budget environment, agencies should use cost/benefit analysis across their project portfolios to facilitate making investment decisions.
3. Some PMs struggle in meeting the business case requirements
   - No buy in
   - Inexperienced
   - Can't find enough tangible dollar savings
   - Difficulty with converting intangible benefits to dollar estimates
4. A set of templates for identifying benefits would help the PMs with cost /benefit analysis. The structure should align with the benefit categories in the Project Portfolio Management tool.
5. Guidance needs to be provided on handling mandates.
6. The PM community needs to be offered comprehensive business case training.
7. Reference material on business case development needs to be provided.

Workgroup Approach? (How will work be accomplished?)

1. Group is empowered to make decisions and work together toward a common purpose
2. EPMO supports the work group as desired with Project Management Advisory Group (PMAG) checkpoints, status updates, charter/rules of engagement, periodic updates to agency CIOs (CIO Council), etc.
3. The team will meet approximately every two weeks for one hour.
4. Decision making should be collaborative and each member has opportunities for input. The chairperson will facilitate consensus.
5. Group members take responsibility for tasks and decide how to meet requirements

2. Workgroup Success

How will we know that the workgroup was successful? (Workgroup will establish 3 - 5 success measures, track progress and provide updates to stakeholders.

- Project teams will invest less time in meeting the business case requirement.
- Stakeholders, especially sponsor, will get an improved perception of the project's value.
- Gate approval process time will be shortened.
- Agency will have an opportunity to better manage its project portfolio.

How can we measure success?

1. Collect project data on in the amount of time/effort spent to build the business case without vs. with the template/training.
2. Track OSBM review resource (time/effort expended for gate approval) and trend before and after workgroup's deliverables are deployed.
3. Feedback from training sessions for PMs.

What are the key deliverables of the workgroup?

1. Template for cost/benefits analysis
2. Development and delivery of business case training to the agencies
3. A comprehensive business case reference guide

Items out of scope

Analysis applying net present value, hurdle rates, ROI, payback.

Key Dependencies

Management support relative to availability of workgroup team members.

3. Workgroup Team Members

Team Member	Email	Phone
Bib Giannuzzi (EPMO)	bob.giannuzzi@nc.gov	754-6604
Valerie Maat (EPMO)	valerie.maat@nc.gov	707-1300
Sarah Porper (OSBM)	sarah.porper@osbm.nc.gov	807-4775
Jim Tulenko (OSC)	jim.tulenko@osc.nc.gov	431-6520
Janet Vaught (DPI)	jvaught@dpi.state.nc.us	807-3227

4. Notes